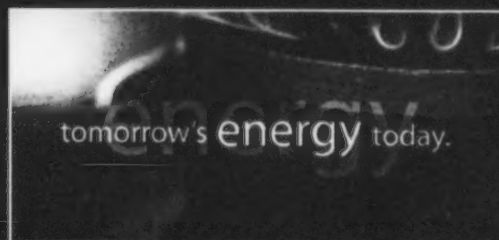


Upstream Dialogue



Tomorrow's energy today

Canadian Natural Gas is the clean, smart choice for today and tomorrow. On June 7 Canadian Natural Gas began an advertising program to raise awareness of the role of natural gas in Canadians lives.

► Read more [about the program](#).

CAPP Events & Updates

CAPP Investment Symposium 2011

June 13 – 15 Calgary, AB

Caravaggio and His Followers in Rome CAPP sponsored event

Opens June 17 Ottawa, ON



CAPP Speaker Series – Michel Kelly-
Gagnon, Montreal Economic Institute
June 20 Calgary, AB

NOIA Conference and Atlantic Canada
Petroleum Show
June 20 - 23 St John's, NL

Inside

Tomorrow's energy today

- The Canadian Natural Gas Initiative is raising awareness of the role that natural gas plays in the lives of Canadians every day. [PAGE TWO](#)

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Employee Perspectives

- Meet Jennifer Pond and Graham Carter, two of the engineers responsible for the Debolt Water Treatment facility, the winner of the 2011 Responsible Canadian Energy Award for Environmental Performance. [PAGE FIVE](#)

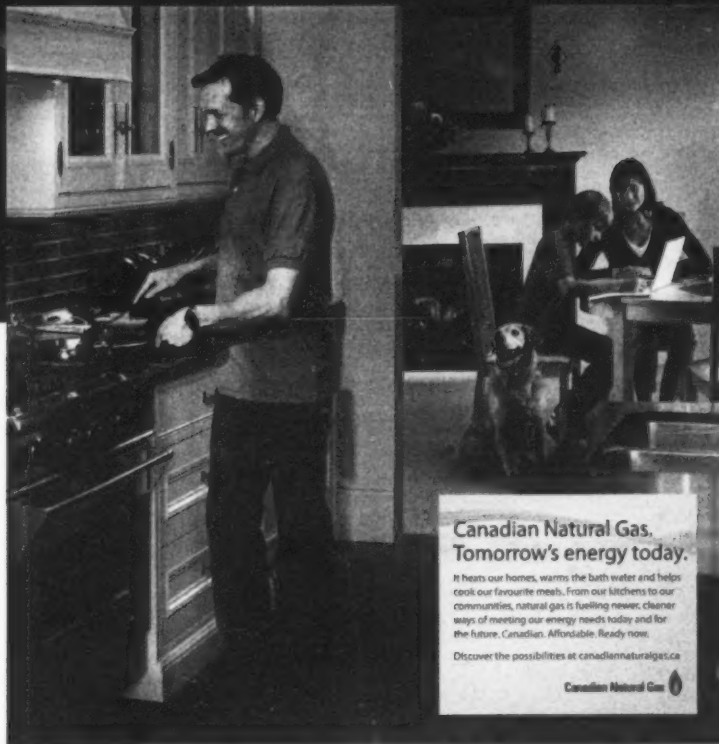
Offshore Success

- Chevron drilled an offshore well in the Orphan Basin with no-lost time incidents. [PAGE SEVEN](#)

Relationships Behind the Resource

- Inside Education is teaching students about the relationship between a healthy environment and a productive economy. [PAGE EIGHT](#)

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Canadian Natural Gas. Tomorrow's energy today.

It heats our homes, warms the bath water and helps cook our favourite meals. From our kitchens to our communities, natural gas is fueling newer, cleaner ways of meeting our energy needs today and for the future. Canadian. Affordable. Ready now.

Discover the possibilities at canadiannaturalgas.ca

Canadian Natural Gas

6.7 trillion cubic feet

Canada's annual production of natural gas, third largest in the world. Source: CAPP

30 %

Natural gas accounts for approximately 30 per cent of Canada's primary energy consumption. Source: CAPP

Canadian Natural Gas

► Watch the Canadian Natural Gas commercial on YouTube.

Canadian Natural Gas, "Tomorrow's energy today"

In the coming weeks Canadians will get a visible reminder of the role that natural gas plays in their lives, as the Canadian Natural Gas Initiative launches television, print, outdoor and online advertising across the country as part of a broad, integrated communications program designed to raise awareness among Canadians of the role natural gas can play in Canada's energy future.

Natural gas touches the lives of Canadians in many ways that they may not be aware of and the advertising campaign illustrates many examples of how natural gas is working to meet Canadians' energy needs today while providing an abundant, safe energy source in the future.

In September of 2010, 1,756 Canadians from coast to coast were surveyed to understand what people thought about natural gas and how it compares to various other sources of energy. The survey revealed that natural gas awareness - from the role natural gas plays in heating and cooling our homes to powering our cities - tends to be low.

Natural gas is a clean and abundant fuel that accounts for approximately 30 per cent of Canada's primary energy consumption. It is a reliable fuel for home heating, power generation and transportation such as long-range transport vehicles, city buses, and garbage trucks.

Interested in learning more about Canadian Natural Gas? Get us in your Twitter and Facebook feeds.

Canadian Natural Gas is on Facebook  Follow us @NatGasCanada 

The Canadian natural gas industry is also an important contributor to our economy. The production, transmission, and delivery of Canadian natural gas will provide 10 million person years of employment over the next 25 years, provides government with a significant source of royalty revenue and provides about \$27.9 billion in exports each year.

Natural gas is also part of a cleaner future for Canada's industrial sector. Natural gas can work in concert with renewable sources of energy, like solar and wind, to ensure that a consistent source of energy is readily available when the winds are calm and the sun doesn't shine. In fact the advertising campaign launched with a solar/natural gas powered billboard to illustrate that natural gas's partnership with renewable energy.

The Canadian Natural Gas Initiative represents the entire natural gas industry and is comprised of the Canadian Association of Petroleum Producers, Canadian Energy Pipeline Association, Canadian Gas Association, Canadian Society for Unconventional Gas and Canadian Natural Gas Vehicle Alliance. The Initiative is engaging Canadians in a dialogue about our energy future and why natural gas is an important and growing part of our energy mix.

► Visit the Canadian Natural Gas web site to find out more.

Photo: Reuters



Prime Minister Stephen Harper and NDP leader Jack Layton celebrate the results of the May 2 election.

Conservatives win majority

On May 2, the Conservative Party of Canada, led by Prime Minister Stephen Harper, won a majority government, securing 166 seats in the 308-seat House of Commons. The result is positive for the Canadian oil and gas industry because it provides stability, continuity and continued focus on the Canadian economy.

The NDP formed the official Opposition with 102 seats, the Liberals were reduced to 34 seats and the Bloc Quebecois to four seats. Green Party leader Elizabeth May won her seat on Vancouver Island.

► For more information, please read the [election summary from Global Public Affairs](#).

Photo: Canadian Press



Next five years look positive for oil and gas

The financial health of the Canadian oil and gas industry looks positive over the next five years, says Peter Tertzakian, Chief Energy Economist of ARC Financial Corporation.

Tertzakian's detailed analysis and findings are published in a new report titled, *Turmoil and Renewal: The Fiscal Pulse of the Canadian Upstream Oil and Gas Industry – A Five-Year Review and Outlook*.

"All Canadians are stakeholders in the future of (the oil and gas) business," said Tertzakian, "And whether you are a corporate leader, policy maker, investor or interested citizen, it is important to develop a broad understanding of the forces affecting Canada's oil and gas industry."

► Read ARC Financial Corporation's [report](#).

The cover of the report features a black and white photograph of an oil pumpjack against a dark sky. A white heartbeat line is superimposed over the image. The title 'TURMOIL AND RENEWAL' is at the top, followed by the subtitle 'The fiscal pulse of the Canadian upstream oil and gas industry' and 'A five-year review and outlook'. At the bottom, it says 'A study prepared by ARC Financial Corp. for the Canadian Association of Petroleum Producers' and 'February 2011'. Logos for ARC Financial Corp. and CAPP (Canadian Association of Petroleum Producers) are at the bottom right.

Quebec has positive image of Alberta

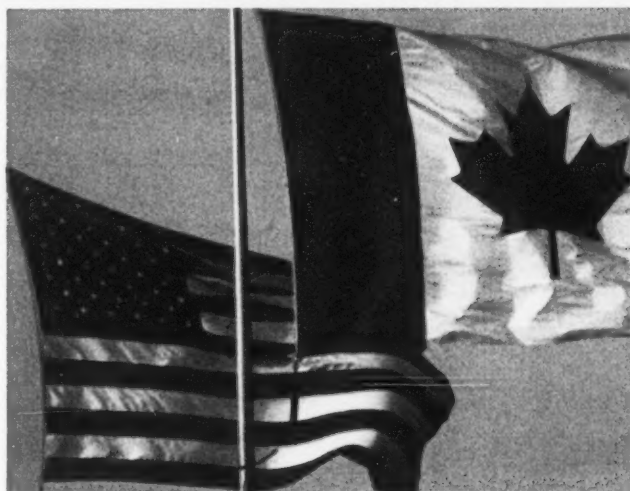
As part of its *Plea for a Quebec-Alberta Dialogue*, the Montreal Economic Institute released the results of a very interesting poll on Quebecers' perceptions of certain political and economic issues related to Alberta.

As it turns out, 61 per cent of Quebecers have a positive image of Alberta. Furthermore, over two thirds (68 per cent) agree with the notion that Quebec must strengthen its political and economic ties with this province.

► Please visit the [Montreal Economic Institute's website](#) for the full poll results.

Michel Kelly-Gagnon
President and CEO,
Montreal Economic Institute

Photo: AP file



Americans value Canadian oil and gas industry

Most Americans strongly value Canada's role as a secure, stable, and friendly supplier of oil and gas to meet the needs of American families and businesses.

Their already strong support for this relationship becomes stronger still when they learn about the jobs Canadian oil creates in America. These are among the highlights of a poll conducted by Harris Interactive for the Canadian Association of Petroleum Producers (CAPP) and the American Petroleum Institute (API).

► View the [research results](#) and read [CAPP's take on the results](#).

News Highlights

No to a New Tar Sands Pipeline

April 2, 2011 New York Times editorial

► Read the [New York Times editorial](#) calling for the United States State Department to deny the Keystone XL pipeline.

► Read CAPP President David Collyer's [response](#) to the editorial.

New Brunswick shale gas: addressing challenges, realizing opportunities

May 3, 2011 Times and Transcript, New Brunswick web site

► Read the [CAPP commentary](#) that was submitted to media around New Brunswick regarding shale gas.

Ottawa's plan to bury the problem

May 1, 2011 Toronto Star editorial

► Read the [Toronto Star editorial](#) that questions the viability of Carbon Capture and Storage.

► Read CAPP Vice-President Greg Stringham's [response](#) to the Toronto Star editorial.

Let's get real about the oil sands

April 21, 2011 Petroleum Economist Unconventional

► Read CAPP president David Collyer's [submission](#) stating that Canada's oil sands are needed to meet the global growth in demand for energy.

CAPP/API poll highlights

33%

of respondents believe that Canada provides less than 100,000 barrels of oil per day.

20x

how much more oil Canada provides per day. Canada currently provides about 2 million barrels per day

88%

of Americans believe the Canadian oil and gas industry works to limit environmental impacts



Employee Perspectives

Using water wisely

Together, Jennifer Pond and Graham Carter have more than 22 years engineering experience in the oil and gas industry and over that period of time they have seen the industry striving to challenge old ideas and problems with new innovations.

This drive towards continuous improvement led Encana and Apache Canada, to design and build the Debolt Water Treatment Plant in the Horn River Basin, which began operations in June of 2010.

The Horn River Basin has the potential to be Canada's first large-scale commercial shale gas development, with Apache and Encana in a 50/50 joint venture partnership to develop the resource in the Two Island Lake area of the Horn River Basin.

"Shale gas being a newer player in the gas market forces producers to rethink existing strategies to reduce the environmental impact," says Pond, a production/process engineer for Encana.

The water treatment plant – the first of its kind in North America – was designed to take sour, saline water from the Debolt formation, a deep sub-surface aquifer 700 hundred meters below potable water sources. The plant pumps the water to the surface, removes the hydrogen sulfide and then Encana and Apache use the water for hydraulic fracturing in the Horn River Basin.

"Water that is produced from the wells is then recycled back into the Debolt formation, treated again in the water plant and re-used," says Carter, a senior facilities engineer for Apache. "The capacity of the plant is to process approximately 100,000 barrels of water a day."

Learn about Apache and Encana's Debolt Water Treatment Plant, winner of the 2011 Responsible Canadian Energy Award for Environmental Performance



Using treated water from the plant means a drastic reduction in the amount of fresh water needed for fracking operations. This unique idea required innovative thinking and engineering from those involved.

"By using underground saline water in place of surface water we have significantly reduced our impact on surface water resources in the area," says Pond. "This project demonstrates our commitment to responsible development."

In a project that is the first-of-its-kind there are many challenges and innovations.

"The materials used in the plant had to deal with a highly corrosive product caused from high temperatures, hydrogen sulfide, carbon dioxide, water and acidity," says Carter. "The water leaving the plant had to meet a specification of having less than four parts per billion of hydrogen sulfide. As a result, we had to develop very precise water analyzers to test and prove that this occurred."

Another innovation is the equipment the plant uses to function as a closed system. "The flow-back water management system allows for reuse of the water over time by re-injecting it back in to the Debolt formation so that it can be treated, and used again. This water cycle is far more advanced than the current practices in the area" says Carter.

Encana and Apache haven't stopped there with more innovations coming to this unique project.

Pond has been involved in the Debolt project from the beginning, first as a member of the concept and execution team of the field pilot

Employee Perspectives (continued)



Name: Jennifer Pond

Title: Production/Process Engineer

Company: Encana

Location: Calgary

Years of Experience: 7

Best part of the job: "To have the opportunity to test an innovative idea in a field pilot phase and have continued support to develop a full scale commercial water treatment plant."

"I think this project proves to stakeholders that industry is using water wisely – it is a precious resource to us too!"

"The plant takes this water deep in the ground, cleans it up makes it usable in the fracturing operations and then puts it back into that deep reservoir."

Name: Graham Carter

Title: Senior Staff Facility Engineer

Company: Apache Canada Ltd.

Location: Calgary

Years of Experience: 15

Best part of the job: "Working with people who have the vision and courage to try things that haven't been done before, like working with our partner Encana to develop the Debolt formation as a water storage reservoir."



test. As the plant was being built, she provided process engineering support and now she's working on optimization and continuous improvement of the water treatment operation.

While water treatment was a great solution in this particular case, Pond says the water realities are different in different regions, and the Debolt Water Treatment Plant is by no means a one-size-fits all solution.

"While there's no guarantee of there being a Debolt type formation in every region, industry needs to ensure responsible water practices are being followed – that includes looking for and considering use of unutilized water, where practical," says Pond.

The Debolt water treatment plant demonstrates that there alternatives that make economic and environmental sense, says Pond. "It's a real success story."

"Another measure of our success is our partnership with Encana," says Carter. "We shared engineering resources in development of the plant, in researching the best way to develop the resource and to use the water. We really came together as companies to work together toward a common solution."

For its innovative work in creating the Debolt Water Treatment Plant, Apache and Encana were awarded the 2011 Responsible Canadian Energy Environmental Performance Award.

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The Stena Carron, working for Chevron, completed the Lona O-55 well with zero lost-time incidents in late August.



Offshore Success

Working safely on the seas

In May 10, 2010, 430 kilometres northwest of St. John's, the Stena Carron drill ship began one of the most scrutinized wells in the history of the Canadian oil industry.

Just 18 days earlier, an explosion on the Deepwater Horizon had killed 11 crewmen and shut down offshore drilling in the United States. Regulators, politicians and the media were vigilant in their surveillance of the operations in the Orphan Basin, and Chevron, the majority owner of the well, ensured safety remained the number one priority.

By the end of August, Chevron and its team had completed the Lona O-55 well without a single lost-time incident, setting the record for drilling in the deepest water depth in Canadian history at 2600 meters.

"Chevron's execution of the Lona O-55 well without a single lost-time incident demonstrated Chevron's ability to operate safely and reliably in harsh, deepwater marine environments such as offshore Newfoundland and Labrador, and elsewhere," said Jeff Lehrmann, president of Chevron Canada. "It also underscored Chevron's ability and willingness to work cooperatively with regulators and governments to ensure incident-free operations and protection of the environment."

One of the key factors in ensuring the well was completed without a lost-time incident was the experience of the crew working on the Stena Carron. Many of the crew who worked on the Lona O-55 exploration program were also involved with the first deepwater well that Chevron drilled in the Orphan Basin in 2006 through 2007. Crew members typically had decades of experience in drilling operations around the world.

Chevron empowered their crews through the extensive use of 'Stop Work Authority.' 'Stop Work Authority' obligates employees, contractors and service providers to stop any work

activity if they suspect an unsafe condition, or if they are just unsure of what is happening.

"Stop Work Authority focuses every single person on a single, common goal: achieving safe and incident-free operations," Lehrmann said. "The successful execution of the Lona drilling program is directly attributable to the extensive use of Stop Work Authority."

As all project managers know, successful execution is also the result of a good design and plan. A dedicated team spent two years designing the well, selecting the equipment, conducting environmental assessments, selecting contractors, establishing management processes and standards, and creating verification systems.

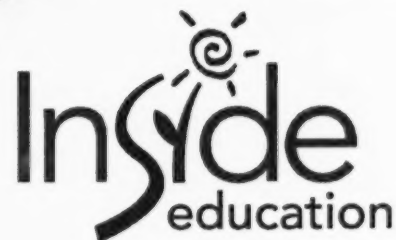
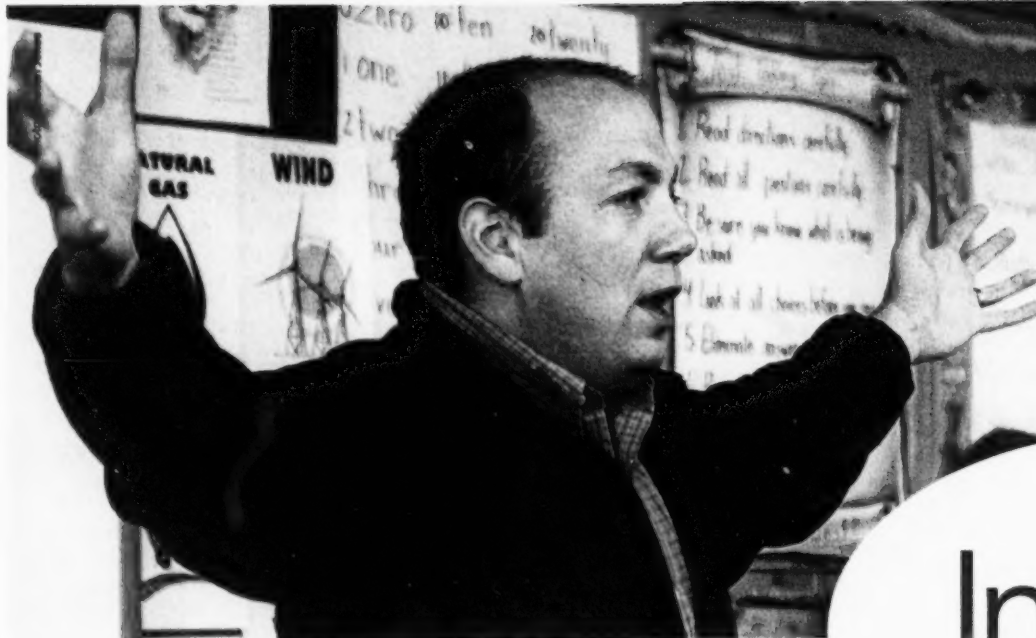
Following the Gulf of Mexico incident, Canada – Newfoundland and Labrador Offshore Petroleum Board (C-NLOPB) added several regulatory oversight measures. Chevron supported the C-NLOPB to ensure full

compliance with the added measures that the Board introduced.

"There were several important takeaways for Chevron from the Lona drilling program. First, this operation confirmed Chevron's global deepwater drilling and well-control practices are safe and environmentally sound," Lehrmann said. "Second, the extensive use of Stop Work Authority by Chevron employees, contractors and service providers was key in maintaining a constant focus on safety throughout the drilling program. And third, it underlined the importance of working closely and collaboratively with the regulator to establish trust and credibility and enhance our 'partner of choice' attributes."

► Learn more about [Chevron's work on Canada's Atlantic Coast](#).

"Stop Work Authority focuses every single person on a single, common goal: achieving safe and incident-free operations," Lehrmann said. "The successful execution of the Lona drilling program is directly attributable to the extensive use of Stop Work Authority."



Relationships Behind the Resource

Smiles in the classroom

For the staff at Inside Education, helping young people explore the world motivates their work.

Inside Education is a not-for-profit education society that provides environment and natural resources education to students from kindergarten to grade 12.

"For our entire organization it is the feeling that we are making a difference in the lives of young people," says Steve McIsaac, executive director of Inside Education. "Whether we take teachers for a walk in the wetlands of southern Alberta, or on a visit to a SAGD facility, or a helicopter tour of the Boreal Forest, we know that young people will ultimately benefit. Students will be led to understand that even though the issues are sometimes complex, the same concepts are also important today and long into the future. If students can understand energy and environmental issues in a manner that puts a huge smile on their faces, that's a pretty good day for us."

Inside Education has worked with CAPP and its member companies for more than 15 years. They have worked with the energy sector by seeking technical expertise for school programs, hosting teacher tours during professional development workshops and, most recently, through Inside Education's participation in CAPP's Energy in Action program, which they've been involved in since its inception in 2004.

"Our expertise is in the school system – in understanding how young people learn, what they need to learn according to the curriculum, and how to make this learning engaging, interactive and meaningful," says McIsaac. "We rely on our friends and supporters

to help us maintain our goal of providing current, relevant and balanced education programming for teachers and students."

One of Inside Education's most recent initiatives, the Generate 2011 Youth Energy Literacy Summit, was an exciting opportunity for 80 high school students and 40 teachers to come together and learn from energy experts about energy in Alberta. The attendees also spent part of the three days brainstorming about increasing energy literacy in Alberta's high schools.

"The excitement and enthusiasm displayed by the students was motivational for all of us at Inside Education. Now as these 'Energy Literacy Teams' return to their high schools, they will implement Action Plans designed to help share the experiences they gained at the Summit. We're excited to see the results," said McIsaac.

Inside Education's approach starts with supporting teachers as they teach about environment and natural resources topics in their classrooms. Inside Education supports teachers by providing classroom and field presentations directly to students and by providing teachers with professional development workshops and tours. Additionally, Inside Education provides teaching tools (kits, videos, posters, etc.) for teachers to use in their classrooms.

"Our approach is based on providing the broad spectrum of points of view on environmental and natural resource issues," says McIsaac. "We are always pleased to be able to incorporate expertise from, for instance, the environmental community and industry alongside academia and government."

► To learn more about Inside Education visit their [website](#).

Alberta government releases development plan for Lower Athabasca region

On April 5, the Government of Alberta released the draft Lower Athabasca Regional Plan (LARP), which outlined use in the Lower Athabasca region.

Overall CAPP believes the draft LARP was a progressive step in the implementation of balanced land use planning and cumulative effects management in Alberta. Land use planning is an important element in maintaining industry's social license to operate and providing the policy and regulatory stability to support longer-term investment decisions in the region.

CAPP did have some concerns about the draft plan. Specifically:

- The precedent of precluding development on some existing leases in conservation and recreation/tourism areas and the uncertainty this creates for developers and investors.
- Existing compensation practices for developers that only recognize sunk costs are inadequate.
- Government must ensure that adequate resources are in place to implement the Regional Plan. An investment must be made by the Government to ensure

that in transitional periods approvals can still be delivered and the regulatory processes built into the regional plan can be delivered.

The government recently concluded a 60-day consultation period, and will consider all of the submissions provided and the concerns Albertans voiced during public consultation. CAPP actively participated in both stakeholder and public consultation sessions to seek clarity and try to resolve outstanding implementation issues.

► Read more about [LARP](#)

► Read [CAPP's Key Messages Regarding LARP](#).

Seeking input on the South Saskatchewan Regional Plan

This fall, the Alberta government will begin seeking public input on recommendations for the South Saskatchewan Regional Plan (SSRP).

The SSRP is the second of seven regional plans being created by the government to identify and set resource and environmental management outcomes for air, land, water and biodiversity. The plans will also guide future resource decisions while considering social and economic impacts.

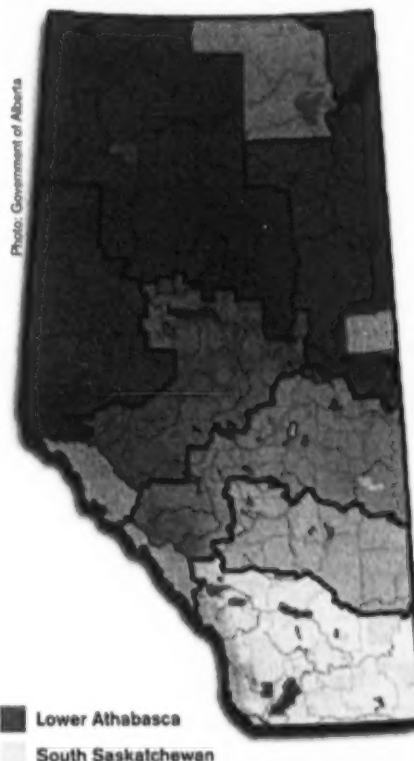
In the initial stages of creating the SSRP, the South Saskatchewan Regional Advisory Council (RAC) used the land-use classification system first developed in the Lower Athabasca Regional Plan that includes proposed management structure for each land-use type – agriculture (cultivated lands and native rangeland), conservation, mixed use (forest), population centers and recreation and tourism. The RAC is suggesting the SSRP:

- Develop options for improving source water protection and other means to protect watershed integrity.

- Examine how the region should develop for long-term success of the agriculture, energy, forestry and tourism industries as well as other economic opportunities.
- Identify, conserve and restore landscapes valued for their water security, ecological function and biodiversity.
- Improve the management of recreation use on public lands and identify locations of lands with high value for recreation and tourism.
- Examine development needs and healthy community objectives and consider the impacts to aboriginal communities.

The government released the SSRP recommendations in late March. CAPP is reviewing the recommendations and is drafting an industry response. In the fall, the government will be holding a series of public and stakeholder workshops to garner input on the South Saskatchewan RAC recommendations.

► Get more information about the [SSRP process](#).



The land-use regions as established by the Government of Alberta.

Helicopter inquiry in final phase

The Offshore Helicopter Safety Inquiry in St. John's, Newfoundland and Labrador will soon issue a final report from the March 2009 fatal crash of a Sikorsky S92-A helicopter.

This final phase of the inquiry will advise the Canada Newfoundland and Labrador Offshore Petroleum Board (C-NLOPB) which of the Transportation Safety Board findings require further action by the C-NLOPB or are the responsibility of others.

CAPP has participated in the inquiry since its inception in April of 2009 and fully supports the inquiry.

The inquiry has already identified regulatory improvements with a view to ensuring a safe working environment for offshore workers who are transported by helicopter to facilities off the coast of Newfoundland and Labrador.

► Read [CAPP and other submissions to the inquiry](#).

► Get more information about [Phase II of the Offshore Helicopter Safety Inquiry](#).

Alberta's move to a single regulator

The Alberta government announced plans on May 10th to establish an integrated, effective and efficient single regulator to replace the current system. This new 'regulatory enhancement' means having a system that is modern, efficient, and effective, while maintaining Alberta's strong commitment to environmental conservation, public safety and resource conservation.

The announcement, released as part of a 28-page white paper titled *Enhancing Assurance: Developing an integrated energy resource regulator*, outlines the operation, key regulatory functions and processes of a proposed single regulator and how Alberta could move to a single regulator.

Currently companies applying for a project may have regulatory interactions with three agencies – Environment, Sustainable

Resource Development and the Energy Resources Conservation Board.

The government report follows the recommendations made by the Regulatory Enhancement Project Task Force in December 2010. The province established the task force in March 2010 to review Alberta's regulatory system as part of the Alberta Competitiveness Review.

The task force analyzed all existing processes and held extensive engagement with First Nations, the oil and gas industry, landowner, municipal and environmental groups. The task group was charged with providing recommendations that will make Alberta's regulatory system modern, efficient and competitive.

The task force made six recommendations, including creating an enhanced regulatory system comprised of two key functions: policy development – performed by the Government of Alberta – and policy assurance, performed by a single regulator for the energy sector.

The province is asking for feedback about how best to structure and empower a single regulator. The government says diligence is necessary to help with the work ahead, designing the structure and writing the legislation that will empower a single regulator.

► Read [Enhancing Assurance: Developing an integrated energy resource regulator](#)

► Learn more about the [Regulatory Enhancement Project](#)

Strong spill prevention recognized

The recent Government of Newfoundland and Labrador's report on the province's offshore oil spill prevention and response capabilities recognize the robust offshore regulatory process, strong spill prevention and response capability existing already.

While recognizing strength in the current system, the report goes on to make 25 recommendations – mostly to regulators and governments – on how to further enhance spill prevention and response capability offshore.

The report results from a review by Captain Mark Turner which began in May 2010. CAPP and its Newfoundland and Labrador based members supported the review and provided information throughout the process.

Industry is reviewing the report and will collaborate with governments and regulators as they consider the recommendations and implementation.

► Read the report [here](#).

► Read more about [spill prevention and response](#).



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Oil Sands What's Really Going On?



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> June 21, 2011 • Shaw Conference Centre • Hall D

Join us on June 21 for a half-day seminar and learn first-hand what Alberta's oil sands are all about and how it affects you, your organization, and Greater Edmonton. This event, jointly organized by EEDC and Canadian Association of Petroleum Producers, is aimed at non-energy industry, business and community leaders, government representatives and associations – anyone interested in Alberta's oil sands. It is a non-technical look at the challenges and opportunities related to the oil sands, which plays such a significant role in our region and province's well-being.

Included in the program are panel discussions and presentations on topics, including Alberta in the world context, oil sands production, value-added manufacturing, mitigating environmental effects, and a look ahead. This is a rare opportunity to hear from top panelists and presenters from the industry in the same room. Suncor Energy CEO Rick George will be the keynote luncheon speaker.

Space is limited and the event is sure to sell out quickly so be sure to buy your tickets right away. For event details and to register, please click here.

Canadian Association of Petroleum Producers (CAPP)

The Canadian Association of Petroleum Producers (CAPP) represents companies, large and small, that explore for, develop and produce natural gas and crude oil throughout Canada. CAPP's member companies produce more than 90 per cent of Canada's natural gas and crude oil. CAPP's associate members provide a wide range of services that support the upstream crude oil and natural gas industry. Together CAPP's members and associate members are an important part of a national industry with revenues of about \$100 billion-a-year.

If you would like to receive this newsletter directly from CAPP, email your request to upstreamdialogue@capp.ca.

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